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From left: Alison Dooher of Charles Schwab, Mike Ursitti of Advyzon Investment Management, Sarah Grieco of Syntax Data and John O'Connell of The Oasis Group speak on stage on Wednesday, March 11, 2026, at the Technology Tools for Today (T3) Conference in New Orleans.

Rob Burgess/Financial Planning

What advisors should prioritize when evaluating tech purchases

By Rob Burgess

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Financial advisors considering options from the growing universe of technology vendors should start with outcomes, not features, and scrutinize how well new tools would integrate with their existing stack, industry executives said at the T3 Conference.

That was the focus of the "From Prospecting to Annual Review: How AI Is Transforming Wealth Management" session held March 11 at the Technology

Tools for Today (T3) Conference in New Orleans.

John O'Connell, CEO of The Oasis Group, moderated the panel featuring Sarah Grieco, director of national accounts at Syntax Data; Mike Ursitti, senior vice president of business development at Advyzon Investment Management; and Alison Dooher, managing director of digital advisor solutions at Charles Schwab.

Instead of simply focusing on features, advisors evaluating a potential tech purchase should first define the outcome they want and then work backward, Ursitti said.

"We're not just mapping specific features to a tiny 'X' solution," he said. "It's, 'Let's understand what your needs are and then tailor the solutions to the outcomes that you're trying to achieve.'"

'Not every integration is created equally'

A common headache for firms continues to be gaps in integration between pieces of the technology stack.

When evaluating potential new technology, advisors should look closely at the promised integrations, O'Connell said — especially during the demonstration process. Integrations can vary widely, from shallow to deep.

"Not every integration is created equally," he said. "Just because it says so on the website, you need to delve a little deeper and ask, 'What is the level of integration?' ... 'Are you sending cloud files around?' Because then, congratulations, you've got yourself another job managing a platform on top of everything else."

Grieco said advisors should look for targeted integrations that address specific gaps, not wholesale replacements.

"We don't have to go in and say, 'We're going to replace everything you already have,'" she said. "It could just be a gap that you have ... that just isn't working. We think about it in a modular way."

Moving forward with agentic AI

Looking to the future of wealth management, panelists said artificial intelligence, especially agentic AI, will change how advisors evaluate and deploy new additions to their tech stacks.

Ursitti said his team is already moving toward an agentic AI model.

"You'll have an agentic AI model for ... reporting, trading and tax loss harvesting," he said. "Then there's going to be an overarching model that runs all of those individual agents."

Rather than entirely new platforms, he expects innovation to come from

embedding AI into existing systems.

"I don't foresee any brand-new technology coming out," Ursitti said. "I think it's going to be more, 'How is existing technology going to be enhanced with the application of AI?' and, 'How is that going to change how advisors run their practice in your business?'"

Dooher said her team at Schwab is also exploring agentic AI, looking at whether to build in-house agents, use third-party vendors or some combination of the two.

"There's an ecosystem of agentic capabilities that I don't necessarily need to build, but I do need to find an interaction model that can bring those specialties together and team out to advisors in a cohesive way," she said. "It will be absolutely a combination of build and partner, likely out of the gate."